



Day 1 – Morning Session

1. Employee Management - 09:00 – 09:50 am

- a. Adding New Employees
- b. Entering Employee Information
- c. Most Common Fields Used
- d. Promoting Employees/Changing Titles
- e. Terminating/Retiring Employees
- f. Setting Up Logins & Assigning Security Profiles
- g. Reports
 - i. View Employee Ledger
 - ii. Employee Listing by Work Group
 - iii. Security Report
 - iv. Employee Listing – Department & Rotation
 - v. Seniority Report
 - vi. Employee Ledger Report

2. Assigning Schedules – 10:00 – 10:50 am

- a. Build Schedule with Rotations
- b. Build Schedules without Rotations
- c. Update Schedule Times
- d. Clear Employee Schedules

Dashboards

- e. Creating/Modifying/Deleting Public Dashboards
- f. Creating/Modifying/Deleting Private Dashboards
- g. Daily Schedule vs Dashboards

3. Basic User Training – 11:00 – 11:50 pm

- a. Logging In/Changing Passwords
- b. Set My Home Page
- c. Update My Information
- d. Schedule Views
 - i. Daily Schedule
 - ii. Monthly Schedule
 - iii. Monthly Calendar



Day 1 – Afternoon Session

4. Supervisor Training – 1:00 – 1:40 pm

- a. Manage Time Off
- b. Manage Overtime
- c. Add Contacts
- d. Move Employees
- e. Change Schedule Times
- f. Manage Schedule Details
- g. Update Schedule Details (Daily)
- h. Change Overtime
- i. Change Time Off
- j. Reports
 - i. Time Off Activity Report
 - ii. Overtime Activity Report
 - iii. Job Assignment Report

5. Payroll - 1:50 – 2:40 pm

Timesheets

- a. Create Timesheets
- b. View/Sign Timesheets
- c. Manage Payroll Processing Status
- d. Export Timesheets to Payroll
- e. Close Payroll
- f. Closed Period Adjustments

6. Payroll – 2:50 – 4:30 pm (Break @ 3:30-3:40 pm)

Setup & Rules

- a. Managing Pay Periods
- b. Payroll Rules
 - i. Overtime Calculation Rules
 - ii. Auto Time Sellback
 - iii. Auto Shift Differential

Review of the Day's Training - Q&A



Day 2 – Morning Session

7. Building Schedule Templates – 9:00 – 9:50 am

- a. Creating Shifts
- b. Commonly Used Options
- c. Creating Schedule Rotations
- d. Standard 5x2 Example
- e. Advance Patrol Example
- f. Sample Button/Preview

8. Setup Schedule Exceptions – 10:00 – 10:50 am

- a. Creating Day Off Reason Types
- b. Creating Overtime Reason Types
- c. Creating Pay Types
- d. Email Destination Defaults

9. Jobs & Details – 11:00 – 11:50 am

- a. Creating Jobs
 - i. Example #1: Work Areas
 - ii. Example #2: Acting Pay
 - iii. Example #3: Training
- b. Schedule Details



Day 2 – Afternoon Session

10. Open Shifts – 1:00 – 1:40 pm

- a. Creating Open Shifts
- b. Open Shift Signup Options
- c. Awarding Open Shifts
- d. Un-awarding Open Shifts/Deleting Signups

11. Time Balance/Accrual Rules – 1:50 – 2:30 pm

- a. Managing Time Balances
 - i. Adding/Removing Time
 - ii. Updating Entries
 - iii. Updating Balances
- b. Creating Work Groups (Contractual Groups)
- c. Configuring Time Off Accrual Rules

12. End of Year Rollover – 2:40 – 3:30 pm

- a. What to Do Before the New Year
- b. What to Do After the New Year
- c. Extending/Building Schedules
- d. Extending/Creating Schedule Rotations
- e. Extending/Building Pay Periods
- f. Rollover of Time Bank Balances
- g. Changing the Schedule Dates

Review of the Day's Training - Q&A